

Welcome!!

Introductions



Use the annotate feature to color while we wait for others to join us.



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Professional Development

SPF-PFS Prevention Training Scholarship

Informational Session

6.20.23

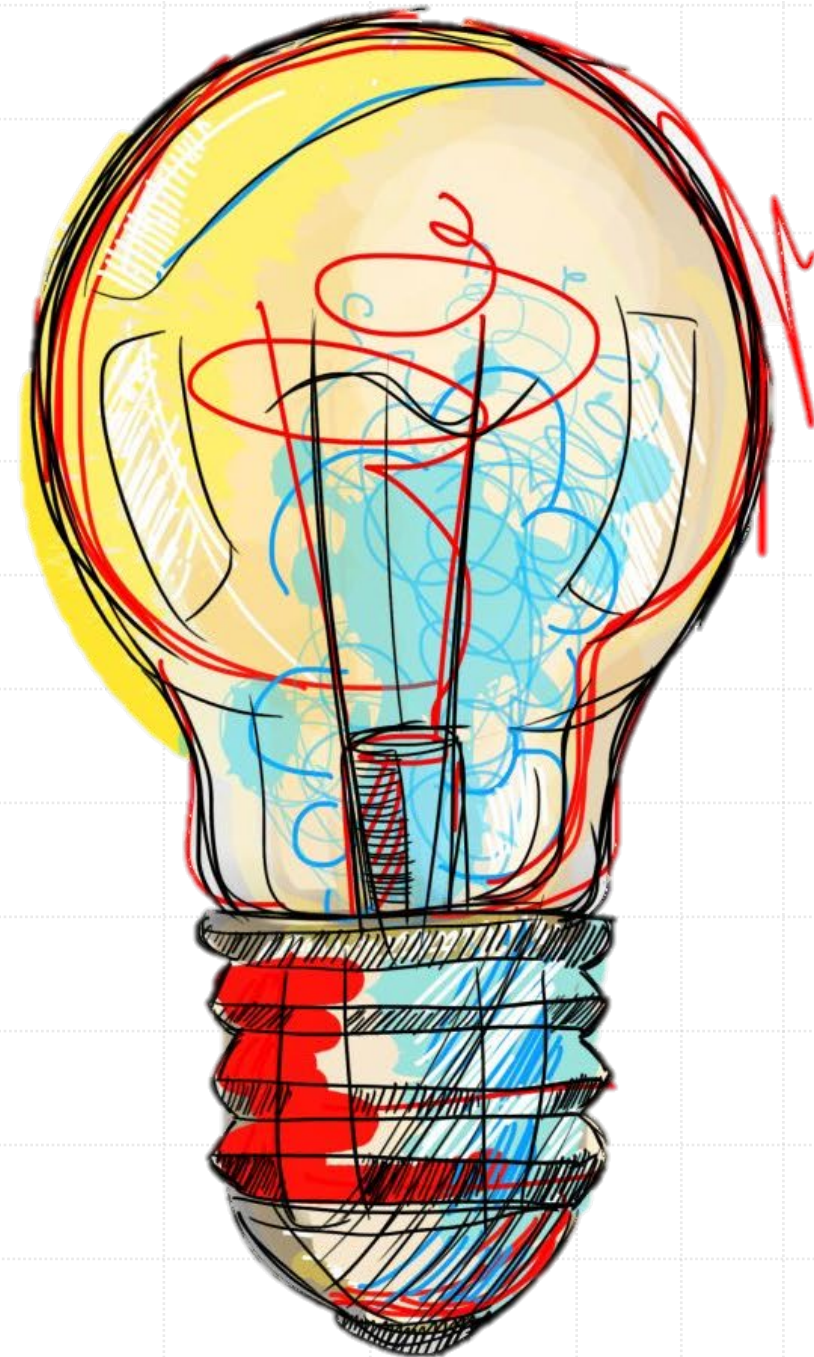
OHIO
UNIVERSITY

Voinovich School of
Leadership and Public Service


SAMHSA
Substance Abuse and Mental Health
Services Administration


Learning Objectives


Discuss





Basic Guidelines


 Agency or the Fiscal Agent of the awardee(s) will receive a SOW based on the information provided on the application


 Funding will be distributed to the agency/fiscal agent named in the application upon completion of the training, *not*, prior to


 Award is \$3000 per person, intention is that the full \$3000 will be used: staff time, flights, travel, parking, lodging, per diem

 Each awardee/agency is responsible for planning travel and registering for conference

 An effort report with documentation including the full agenda for the conference, invoice, & itemized receipts for any travel related expenses must be submitted no later than 15 days after completed training

 Send separate invoices and effort reports for each individual traveling

 In the event of an emergency, funding is transferable to another agency team member if awardee cannot attend

 Agencies/fiscal agents assume total liability for persons traveling.

Notes on Reimbursement

- Agencies need to submit proper documentation in order to be reimbursed
 - Receipts must show a paid in full/zero balance
 - Receipts need to be itemized
- Acceptable reimbursable expenses include staff time, travel, conference registration, lodging, flights, and a flat rate per diem for meals and incidentals (GSA rates)
 - <https://www.gsa.gov/travel/plan-book/per-diem-rates>
- Alcohol is not a covered expense

Timeline for reimbursement:

Expect payment of the invoice 30 days from the date of the invoice. If you have any questions about payment, please email financecustomercare@ohio.edu for assistance.



What does my receipt need to include?

The receipt needs to include the following:

- Business/Vendor Name and location
- Date of Purchase
- Description of items purchased
- Price of each item purchased
- Total amount paid, including tip if applicable, not to exceed 20%
- Method of payment (sometimes is included but not always)



Travel Tip!

Using a free app like Adobe Scan allows you to scan your paper receipts, agendas, or attendance and save them as a pdf and email. Download it through your app store.



Process for Reimbursement



Complete one invoice for each traveler, be sure to include PO and UT#'s



List out all expenses separately on the invoice – see example



Collect all itemized receipts and proof of expenses for invoicing



Scan documentation and send as one file



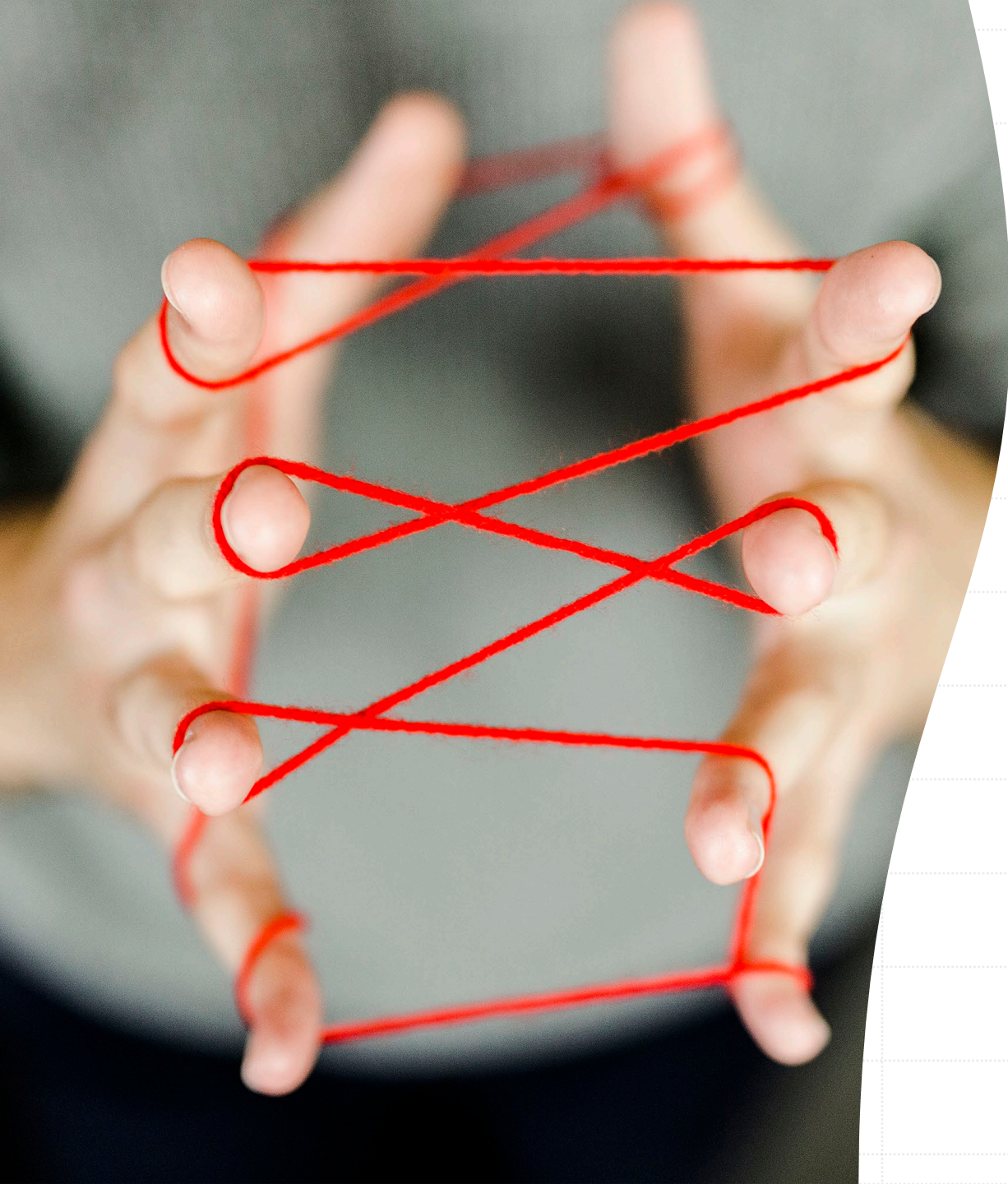
Send documentation along with invoice and effort report to Leslie Hoylman at hoylman@ohio.edu no later than 30 days



Funds will be sent up to 30 days after date of invoice

Be sure to include:

- Flight confirmations with itinerary and paid-in-full documentation
- Conference agenda with proof of attendance (picture of attendance or CEU's, if applicable)
- Accommodation confirmation with paid-in-full documentation (in-room expenses not included)
- Receipts for transportation: Uber, parking, etc. (including gratuity, exclusions apply see FAQ)
- Ensure invoice contains all information stated on FAQ



Invoicing FAQ's

- Invoice expenses for each awardee separately – individual invoice cannot exceed \$3000
- Cannot invoice for expenses incurred outside the dates of service
- Dates of service on the invoice need to coincide with dates of first/last purchase-See FAQ document
- PO # and UT # must be on the invoice
- Invoices Remit To information must match exactly the information on the Supplier Payee Information (SPIF)
- Template and example available at <https://www.spfpfs-seo.com/>

Invoicing Example

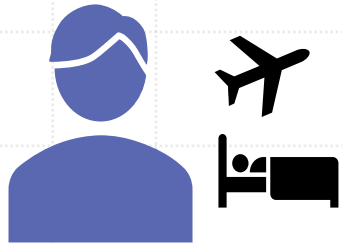


Company ABC

PO Number received 6/21- #123456

UT Number- 21163

2 Awardees



Purchases travel 7/6, registers for conference 6/28, flight home 7/21



Purchases travel 6/29, registers for conference 6/23, flight home 7/20

Remit to:
 Company ABC
 123 Awesome Way
 You Got This, OH 45678
 937-123-1234
woohoo@abc.org





Invoice # 4
 Invoice Date: **7/22/23**
 PO# 123456
 UT (Subaward) # 21163
Dates of Service:
 6/23/23-7/22/23

To:
 ATTN: Leslie Hoylman
 Ohio University
 1 Ohio University Dr.
 Athens, OH 45701

CATEGORY	DESCRIPTION	QTY	RATE	AMOUNT
Mileage	To/from Columbus airport (GSA Rates)	50	.65/mile	\$32.50
Lodging	1 room at the Gaylord, Grapevine TX for 4 nights	1	\$219.50	\$878.00
Travel	SW Flight number 1234, leaving Columbus, OH on 7/16 to Dallas/Ft. Worth, returning 7/20 to Columbus, OH	1	\$760	\$760.00
Registration	Registration fees for CADCA Midyear	1	\$1155	\$1155.00
Per Diem	M&IE first and last day of travel	2	\$48	\$96.00
Per Diem	M&IE for 2 days	2	\$64	\$128.00
Travel	Uber to and from the airport/hotel	2	\$42	\$84.00
UNREIMBURSABLE PER \$3000 MAX				-\$133.50
Balance Due				\$3000.00



Travel FAQ's

-  Wait to purchase travel, lodging, or register for the conference until your fiscal agent of financial department receives the PO#
-  If checking a bag, please select that option when booking your flight or save receipt from checked bag and submit with invoice
-  Travel to and from dining is covered by incidental per diem rates
-  Upgrades for travel including business, economy plus, and first class are not reimbursable

Next Steps

1

Research flights and hotels, but do not book until receive PO number.
(check with fiscal if PO received)

2

Book travel and accommodations

3

Keep track of documentation and have a great trip!

Questions?

A recording of this information session and copies of the slides, emergency change form, and invoice template and example can be found on <https://www.spfpfs-seo.com/>

Email Leslie Hoylman at hoylman@ohio.edu for further assistance.

